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Report Highlights:

Brazil's milk production is forecast to increase by 3 percent in 2005 to 24 billion liters and most dairy products will show a similar increase in production boosted by higher purchasing power and lower unemployment rates. In 2005, the Brazilian dairy sector will have the first trade surplus on record, as the value of dairy exports will likely surpass imports.

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Table of Contents

Executive Summary	3
Commodity Outlook, Fluid Milk	3
Production.....	3
Consumption	4
Prices.....	4
Trade	4
Tariff Rate Table	4
Stocks	5
Policy.....	5
Commodity Outlook, Cheese	6
Production.....	6
Consumption	6
Prices.....	6
Trade	7
Tariff Rate Table	7
Commodity Outlook, Butter	7
Production.....	7
Prices.....	8
Tariff Rate Table	8
Commodity Outlook, Powdered Milk	8
Production.....	8
Consumption	9
Prices.....	9
Trade	9
Tariff Rate Table	9
Stocks	10
Policy.....	10
Marketing	10
Tables	12
PSD: Dairy, Milk, Fluid	12
Imports: Dairy, Milk, Fluid	13
Exports: Dairy, Milk, Fluid	14
PSD: Dairy, Cheese.....	15
Imports: Dairy, Cheese.....	16
Exports: Dairy, Cheese	17
PSD: Dairy, Butter.....	18
Imports: Dairy, Butter.....	19
Exports: Dairy, Butter.....	20
PSD, Dairy, Dry Whole Milk Powder	21
Imports: Dairy, Dry Whole Milk Powder.....	22
Exports: Dairy, Dry Whole Milk Powder	22
PSD: Dairy, Milk, Nonfat Dry	24
Imports: Dairy, Milk, Nonfat Dry	25
Exports: Dairy, Milk, Nonfat Dry	26

Executive Summary

Market analysts project economic growth around 5 percent in 2005, reflecting the results of strong measures in fiscal and monetary policies to curb inflation rates and the public deficit. Spurred by record exports, most sectors of the Brazilian economy increased their capacity utilization to meet a growing world demand for Brazilian goods. Lower unemployment rates and increased disposable income will likely boost domestic demand in general.

The dairy sector is expected to benefit from these improved economic conditions. Total milk production is forecast to increase by 3 percent in 2005, and most dairy products will show a similar increase in production boosted by higher purchasing power and lower unemployment rates. The Brazilian dairy sector will likely register its first trade surplus on record in 2005, as the value of dairy exports will likely surpass imports.

Commodity Outlook, Fluid Milk

Production

Note: Official milk production data in Brazil does not include non-commercial and "informally" marketed milk, which represents about 35 percent of total milk production. OAA estimates are based on interviews with trade and government sources and include both commercial, as well as non-commercial and informally marketed milk.

Fluid milk production for CY 2005 (Jan-Dec) is forecast to increase to 24 billion liters, up 3 percent from the current year. The increase in production reflects higher productivity, mostly from milk producers associated with large Brazilian companies, and assumes good weather conditions in the major producing areas. Higher demand for fluid milk from social programs and continued favorable prices for milk producers, supported by higher dairy exports, are also expected to boost an increase in demand next year.

Higher productivity is the major factor contributing to increased milk production in Brazil. The increase is coming mostly from integrated producers who have the support of large multinational and Brazilian dairies, such as Nestle, Parmalat, and Itambe. These companies provide support to dairy farmers to invest in genetics, nutrition, quality, and improved management practices. According to the most recent data available from the 15 largest dairies in Brazil, the number of milk producers under contract with these companies dropped by 16 percent to 95,847 producers in 2002 from 114,216 producers in 2001, but the average productivity of these producers, increased by 24 percent, from 458 liters/day per producer in 2001 to 567 liters/day per producer in 2002.

Brazilian dairy producers are entitled to investment funds from the national milk development program (Pro-Leite). For the 2004/05 marketing year, the government has allocated US\$33 million to finance producers to increase productivity through herd improvement, emphasis on quality, and improved management practices.

Another major production factor is the increasing concentration of milk production in the industry. In 2004, the 15 largest dairies should account for nearly 63 percent of total fluid milk production under federal inspection, an increase of 5 percent from 2003. The concentration of production among fewer dairies also contributed to increased concentration among fewer states, with production moving from traditional milk producing areas in Minas Gerais to new frontier areas in the Center-West region of the country.

Consumption

Overall consumption of fluid milk is forecast to increase by three percent in CY 2005. The increase is derived mostly from consumption for industrial use. The increase in the employment rate and in the purchasing power of Brazilian consumers is expected to boost consumption of dairy products. Exports of dairy products are also contributing to higher demand of fluid milk for industrial use.

According to trade sources, consumption of Ultra High Temperature (UHT) milk in 2005 will reach nearly 86 percent of total fluid milk consumption in Brazil. The increase in consumption of UHT is due to several factors, including greater convenience to consumers, carton packaging (not glass or plastic), no need for refrigeration, and competitive pricing. Brazilian supermarkets sell predominantly UHT milk, leaving "C" and "B" type refrigerated fresh milk to be sold by the traditional mom-and-pop bread and convenience stores, but at lower volumes.

Prices

During September 2004 the average price paid to producers in Brazil was R\$0.55 per liter (US\$ 0.19 per liter), up 2.3 percent from the same period in 2003. The cost of production for the same month is estimated at US\$ 0.16.

The average price of fluid milk (type "C") paid to producers during Jan-Dec 2003 was R\$0.45 per liter in Minas Gerais (largest dairy state in Brazil), followed by R\$0.43 per liter in Goiás (second largest milk producer). Assuming the average exchange rate of R\$3.06 per U.S. dollar in 2003, these prices were respectively US\$ 0.15 and US\$ 0.14 per liter. Average producer prices for milk in 2002 were 16 percent higher compared to 2001.

Trade

Imports of fluid milk, mostly packaged UHT milk sold by companies from Argentina and Uruguay with commercial interests in Brazil, continued to drop in 2004, but it is expected to stabilize in 2005, although at insignificant levels. Trade analysts attribute this drop to two factors: a) the major devaluation of the Brazilian currency relative to the U.S. dollar in 2003; and, b) higher domestic fluid milk production.

Brazil exports insignificant quantities of packaged fluid milk, mostly to Paraguay and the Philippines.

Tariff Rate Table

Tariff Number (HTS)	Product Description	Rate (%) (1)	Other Info
0401.10.10	Milk and Cream, UHT	14	Mercosul: Zero
0401.10.10	Milk and Cream, UHT	12	Mercosul: Zero

Note: (1) MERCOSUL's Common External Tariff (CXT). The CXT is applied to all imports other than from MERCOSUL. These tariffs are assessed on the CIF value of the product. In addition, imports of milk and cream pay a PIS/COFINS (social tax) of 9.25 percent.

Stocks

There are no government stocks of milk or milk products in Brazil.

Policy

The new Agricultural and Livestock Plan for the 2004/2005 season announced in July 2004, by the federal government allocates about R\$39.5 billion: (US\$ 13.2 billion for rural credit, of which R\$10.7 billion (US\$ 3.6 billion) is for investment credit in the sector, up 86 percent from 2003. Dairy cattle producers can benefit from the following investment credit programs, with subsidized interest rates (8.75 percent per year), to increase productivity and overall milk production:

a) PRODEAGRO. This program incorporated last year's program called PROLEITE. The program is designed to modernize milk producer's operations, provide incentives for cooling milk at the farm, transportation, and silage. For the 2004/2005 marketing year, the total amount of funds allocated under the PRODEAGRO is R\$200 million (US\$ 67 million), with a loan limit per producer established at R\$60,000 (US\$ 20,000).

b) MODERFROTA. This program is designed to finance farm equipment in general. Total funds allocated under this program for 2004/2005 are R\$5.5 billion (US\$ 1.8 million), and loan limits vary according to the income of the producers.

c) MODERINFRA. This program allows dairy producers to build or rebuild silos and warehouses on their farms. The program was recently modified to include irrigation systems. Funds allocated to this program during 2004/2005 are R\$700 million (US\$ 233 million) and are limited to R\$100,000 (US\$ 33,000) per producer.

d) MODERAGRO. This program incorporated last year's program called PROPASTO. This program is designed for pasture improvement and recently was modified to include soil erosion and conservation of lowlands. Total funds allocated under this program for 2004/2005 are R\$900 million (US\$ 300 million), and are limited to R\$200,000 (US\$ 67,000) per producer.

Milk producers are also entitled to state dairy development programs designed to increase productivity through pasture improvement and animal genetics. State government programs are also developed to assist and improve social and economic conditions of the small milk producers. However, the most important state subsidy program to milk producers is the exemption of the state value-added tax (ICMS) on the sale of milk by producers and cooperatives. This benefit, however, is only available for few a states in Brazil, mostly in the center-west and south regions.

In addition to these federal and state programs, milk producers also benefit from financing programs from large dairies, such as Nestle and Parmalat, which are specifically designed to increase milk productivity and quality. These programs are only available for those integrated milk producers with these respective dairies.

Other major policies affecting the dairy sector in 2004/05 are:

a) Minimum reference price for milk of R\$0.38 or (US\$ 0.13), per liter, for the states located in the southeast of Brazil, and R\$0.36 (US\$ 0.12), per liter, for other regions. These prices are used as reference for government loan programs, and do not reflect real market prices paid to producers, currently around R\$0.56 (US\$ 0.19), per liter;

b) The Ministry of Agriculture, Livestock, and Food Supply (MAPA) also announced the implementation of the National Program to Increase Milk Quality and Control (PNQL), which is designed to benefit consumers and increase exports. This program is also designed to control fraud in milk production, such as the mixture of whey powder in fluid milk and to curb production of informal milk.

c) MAPA also began the enforcement of a federal rule that prohibits the use of imported powdered milk in social feeding programs financed by the federal or state governments. In addition, the federal government also increased surveillance of non-tariff barriers on dairy imports, such as formal review and registration of foreign processing plant inspection systems, greater pre inspection of plants in exporting countries, certificates of origin, laboratory product-quality tests, and product label registration according to the Brazilian consumer law. Since 2002, the Brazilian Inspection Department for Products of Animal Origin (DIPOA) resumed the registration of new U.S. dairy export plants to export their products to Brazil.

d) The FOME ZERO (Zero Hunger) program, initially announced as the major social program of the new federal administration, has been recently modified to include other social assistance programs. This program is beginning to provide financial assistance to the poor. Milk producers expect to benefit from this program in 2005.

e) The Ministry of Agriculture, Livestock and Food Supply (MAPA) is also in the process of publishing rules regarding the traceability program for milk producers.

Commodity Outlook, Cheese

Production

Note: There are no official statistics on production and consumption of cheese in Brazil. OAA production estimates for cheese are based on interviews with trade contacts and also include "informal" cheese production.

Post forecasts cheese production in CY 2005 to increase by two percent reflecting some improvement in the domestic demand for cheese combined with an increase in cheese exports.

Consumption

Human consumption of fresh cheese is expected to increase in 2005 reflecting the higher purchasing power of consumers. However, most of the increase in demand will continue to come from the fast-food industry, institutional, and "specialty" cheeses (Gruyere, Gouda, Cheddar).

Prices

Average wholesale prices of Brazilian-produced cheese by major types are:

Type	US\$/Kilogram
Minas (fresh farmer type)	3.28
Mozzarella	3.05
Provolone	3.80
Parmesan	4.55

Notes: (1) Prices for Sao Paulo market, as of 10/30/2004.
 (2) Current Exchange Rate: US\$1.00=R\$2.90

Trade

Cheese imports are expected to stabilize in 2005 after several years of continued drop in cheese imports. Argentina and Uruguay remain as the main suppliers of cheese to Brazil, basically because of the preferential tariff treatment deriving from the MERCOSUL Agreement.

Exports of cheese are expected to be higher than imports in 2005 for the first time on record, because of the favorable exchange rate, which makes the Brazilian product competitive in world markets, and lower production costs. However, the cheese industry is generally not prepared to make major in-roads into the world markets due to the lack of marketing infrastructure.

Tariff Rate Table

Tariff Number (HTS)	Product Description	Rate (%)	Other Info
0406.10.10	Cheese, Mozzarella	16	Mercosul: 27%
0406.10.90	Cheese, Other	16	Mercosul: Zero
0406.20.00	Cheese: Grated or Powdered	16	Mercosul: Zero
0406.90.10	Cheese, with a fat content less than 36 %, by weight	16	Mercosul: 27%
0406.90.20	Cheese with a fat content superior or equal to 36 % and less than 46%,by weight	16	Mercosul: 27%

Notes:

(1) MERCOSUL' s Common External Tariff (CXT). The CXT tariff is applied to all imports other than from MERCOSUL. These tariffs are assessed on the CIF value of the product. In addition, imports of cheese pay a PIS/COFINS (social tax) of 9.25 percent.

(2) Effective June 1, 2001, these types of cheeses were included on the "exception list" of the Common External Tax (CXT), of the MERCOSUL, per Resolution 16/01, of the Foreign Trade Chamber (CAMEX), which altered Annex Two of the Decree Number 3,704 of December 27, 2000. The 27% tax is charged in addition to the Import Tariff of 18.5 percent for all imported cheeses, including MERCOSUL members

Commodity Outlook, Butter

Production

Note: There are no official statistics on production and consumption of butter in Brazil. OAA Production estimates for butter are based on interviews with trade contacts, and also includes "informal" butter production.

Butter production is projected to increase by 3 percent in CY 2005, reflecting a small increase in domestic demand and lower imports. Competition from margarine remains strong, with margarine production expected to rise to 845,000 metric tons in 2005, up 4.8 percent from 2004. Imports are expected to continue to drop next year because of the high cost of imports due to the devaluation of the Brazilian currency. Uruguay, and to a lesser extent, Argentina, are the only suppliers of butter to Brazil.

Prices

Type	US\$/kilogram
Salted	2.00
Unsalted	1.90

Notes: (1) Prices for Sao Paulo market, as of 10/30/04.

(2) Average Exchange Rate: US\$1.00=R\$2.90

Tariff Rate Table

Tariff Number	Product Description	Rate (%) (1)	Other Info
0405.10.00	Butter	16	Mercosul: Zero
0405.90.10	Butter Oil	16	Mercosul: Zero

Note: MERCOSUL's Common External Tariff (CXT). The CXT tariff is applied to all imports other than from MERCOSUL. These tariffs are assessed on the CIF value of the product. In addition, imports of butter pay a PIS/COFINS (social tax) of 9.25 percent.

Commodity Outlook, Powdered Milk

Production

Note: There are no official statistics on production and consumption of powdered milk in Brazil. OAA estimates for powdered milk production (nonfat and whole milk) are based on interviews with the trade.

Post forecasts powdered milk production to increase by over 4 percent in 2005 to 553,000 metric tons, of which 80 percent is whole milk powder (WMP), and 20 percent is nonfat dry milk powder (NDM). The following factors support higher Brazilian powdered milk production in 2004/05:

- a) Higher import tariffs, devaluation of the Brazilian currency, and minimum import prices reduced imports of subsidized powdered milk;
- b) Higher exports of powdered milk because of a continued favorable exchange rate;
- c) Prohibition of the use of imported powdered milk in government's social programs;
- d) Higher allocation of government funds for social programs at the federal and state levels; and,
- e) Higher sanitary standards for imported milk;
- f) New credit programs have more than R\$100 million (US\$ 34 million) by the National Bank of Economic and Social Development (BNDES) to finance new investments for powdered milk production. This does not include private sector capital, which brings total investments up to US\$ 100 million; and,
- g) Reported increase of 25 percent in sales of equipment for producing powdered milk.

Consumption

Post forecasts powdered milk consumption to increase in 2005 by 2 percent, in view of the prospects for economic growth, lower unemployment, and higher consumer income. In addition, during 2005, the federal government is expected to allocate a significant amount of funds for social programs designed to fight poverty and hunger.

Prices

Average wholesale prices of powdered milk, by type, are:

Type	US\$/kilogram
Whole milk powder	4.48
Nonfat dry milk powder	4.31

Notes:

- (1) Prices for Sao Paulo market, as of 10/30/04.
- (2) Average Exchange Rate: US\$ 1.00=R\$2.90

Trade

Imports of powder milk (both whole and nonfat) are estimated to decline by 30 percent in 2004, following a significant drop of nearly 48 percent in 2003. The significant decline of powdered milk imports in both years is the result of higher import duties (after the antidumping investigation), minimum import prices, and 17 percent devaluation of the Brazilian currency in 2003.

Argentina and Uruguay are the major suppliers of powdered milk to Brazil, accounting together for 86 percent of total imports, which is comprised mostly of whole milk powder (83 percent of the total imported). New Zealand is a minor supplier of powder milk to Brazil, accounting for nearly 5 percent. The United States is not competitive in the Brazilian market for powder milk.

Post forecasts exports of powder milk, mostly whole milk, to increase significantly in 2005 by over 500 percent due mostly to a favorable exchange rate and new markets for the Brazilian products. Iraq and Algeria replaced Angola as the main destinations for Brazilian powder milk.

Tariff Rate Table

Tariff Number (HTS)	Product Description	Rate (%)	Other Info
0402.21.10	Whole Milk Powder	16	Mercosul: 27%
0402.21.20	Nonfat Milk, Powder	16	Mercosul: 27%
0404.10.00	Whey Powder	14	Mercosul: 27%

Notes:

- (1) MERCOSUL's Common External Tariff (CXT). The CXT tariff is applied to all imports other than from MERCOSUL. These tariffs are assessed on the CIF value of the product. In addition, imports of powder milk pay a PIS/COFINS (social tax) of 9.25 percent;

- (2) Effective June 1, 2001, milk powder was included in the "exception list" of the Common External Tariff (CXT), of the MERCOSUL, per Resolution 16/01, of the Foreign Trade Chamber (CAMEX), which altered Annex Two of the Decree Number 3.704 of December 27, 2000. The 27 percent tax is charged in addition to the import tariff of 18.5 percent to all markets, including MERCOSUL members.
- (3) In addition to the above tariffs, the Brazilian Foreign Trade Board (CAMEX) published the final report of their official dumping investigation, with the following results:

Country	Companies	Applied Rates (%)
New Zealand	New Zealand Dairy Board	3.9
	All other companies	3.9
European Union	All companies, except Arla Foods Ingredients Amba (see note below)	14.8
	Cerealin S.A.	16.9
Uruguay	All companies (see note below)	16.9

Note: Argentina, and later Uruguay, negotiated with Brazilian officials a minimum export price for powdered milk exports to Brazil. Arla Foods Ingredients Amba from Denmark also negotiated a minimum export price. The minimum price was established at US\$1,900 per metric ton, FOB, and calculated using USDA's price list.

- (4) Effective August 26, 2002, whey powder was included in the "exception list" of the Common External Tariff (CXT), of the MERCOSUL, per Resolution 21, of the Foreign Trade Chamber (CAMEX), published in the Diario Oficial (Brazil's Federal Register) on August 26, 2002. The 27 percent tax is charged in addition to the Import Tariff of 15.5 percent to all markets, including MERCOSUL members.

Stocks

There are no official government stocks of powdered milk in Brazil.

Policy

Please see section under Fluid Milk

Marketing

Two important business organizations were formed in Brazil to market Brazilian powdered milk overseas:

- 1) SERLAC. The first Brazilian dairy trading to export Brazilian made dairy products, mostly powdered milk, under the brand "Brazilian Dairy Board", following the example of New Zealand. SERLAC includes five major dairies and cooperatives: Itambe, Confepar, Paulista (CCL), Emare and Ilpisa. SERLAC is working in the following markets: Algeria, Morocco, Libya, Middle East, and Latin America. The United States is also a target market.

2) DPA. Nestle and Fonterra from New Zealand formed a joint venture called Dairy Partners of Americas (DPA), which entered into operation on January 1, 2003. The company has its headquarters in Brazil, and will operate in Latin American countries. During 2003, DPA is operating only in Argentina, Brazil, and Venezuela, expanding later to Chile, Ecuador, Colombia, and the Caribbean Islands. In 2004, DPA plans to initiate sales to the NAFTA countries. Nestle's seven milk plants in Brazil will service as the production base for DPA.

Tables

PSD: Dairy, Milk, Fluid

Brazil Commodity Dairy, Milk, Fluid (1000 HEAD)(1000 MT)							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Cows In Milk	15300	15300	15100	15200	0	15100	(1000 HEAD)
Cows Milk Production	22860	22860	23163	23317	0	24016	(1000 MT)
Other Milk Production	0	0	0	0	0	0	(1000 MT)
TOTAL Production	22860	22860	23163	23317	0	24016	(1000 MT)
Intra EC Imports	0	0	0	0	0	0	(1000 MT)
Total Imports	3	3	3	1	0	2	(1000 MT)
TOTAL Imports	3	3	3	1	0	2	(1000 MT)
TOTAL SUPPLY	22863	22863	23166	23318	0	24018	(1000 MT)
Intra EC Exports	0	0	0	0	0	0	(1000 MT)
Total Exports	2	2	4	2	0	2	(1000 MT)
TOTAL Exports	2	2	4	2	0	2	(1000 MT)
Fluid Use Dom. Consum.	12391	12391	12589	12743	0	12750	(1000 MT)
Factory Use Consum.	10320	10320	10423	10423	0	11116	(1000 MT)
Feed Use Dom. Consum.	150	150	150	150	0	150	(1000 MT)
TOTAL Dom. Consumption	22861	22861	23162	23316	0	24016	(1000 MT)
TOTAL DISTRIBUTION	22863	22863	23166	23318	0	24018	(1000 MT)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

Imports: Dairy, Milk, Fluid

Import Trade Matrix Country Brazil Commodity Dairy, Milk, Fluid			
Time Period	Jan-Dec	Units:	Metric Tons
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Argentina	9		1
Paraguay	1		0
Uruguay	18		1
Total for Others	28		2
Others not Listed	0		0
Grand Total	28		2

Exports: Dairy, Milk, Fluid

Export Trade Matrix Country Brazil Commodity Dairy, Milk, Fluid			
Time Period	Jan-Dec	Units:	Metric Tons
Exports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Paraguay	1		1
Philippines	2		1
Total for Others	3		2
Others not Listed			
Grand Total	3		2

PSD: Dairy, Cheese

Country Brazil Commodity Dairy, Cheese (1000 MT)							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Beginning Stocks	0	0	0	0	0	0	(1000 MT)
Production	460	460	470	470	0	480	(1000 MT)
Intra EC Imports	0	0	0	0	0	0	(1000 MT)
Total Imports	6	6	6	5	0	5	(1000 MT)
TOTAL Imports	6	6	6	5	0	5	(1000 MT)
TOTAL SUPPLY	466	466	476	475	0	485	(1000 MT)
Intra EC Exports	0	0	0	0	0	0	(1000 MT)
Total Exports	3	3	4	5	0	6	(1000 MT)
TOTAL Exports	3	3	4	5	0	6	(1000 MT)
Human Dom. Consumption	463	463	472	470	0	479	(1000 MT)
Other Use, Losses	0	0	0	0	0	0	(1000 MT)
Total Dom. Consumption	463	463	472	470	0	479	(1000 MT)
TOTAL Use	466	466	476	475	0	485	(1000 MT)
Ending Stocks	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	466	466	476	475	0	485	(1000 MT)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

Imports: Dairy, Cheese

Import Trade Matrix Country Brazil Commodity Dairy, Cheese			
Time Period	Jan-Dec	Units:	Metric Tons
Imports for:	2002		2003
U.S.	30	U.S.	5
Others		Others	
Argentina	5,640		2,192
European Union	1,198		785
New Zealand	55		214
Switzerland	233		124
Uruguay	3,590		2,666
Total for Others	10716		5,981
Others not Listed	38		3
Grand Total	10784		5989

Exports: Dairy, Cheese

Export Trade Matrix Country Brazil Commodity Dairy, Cheese			
Time Period	Jan-Dec	Units:	Metric Tons
Exports for:	2002		2003
U.S.	493	U.S.	983
Others		Others	
Argentina	804		825
Chile	335		676
Paraguay	59		281
Taiwan	185		125
Total for Others	1383		1907
Others not Listed	246		290
Grand Total	2122		3180

PSD: Dairy, Butter

Country Brazil Commodity Dairy, Butter (1000 MT)							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Beginning Stocks	0	0	0	0	0	0	(1000 MT)
Production	72	72	70	75	0	78	(1000 MT)
Intra EC Imports	0	0	0	0	0	0	(1000 MT)
Total Imports	4	4	2	1	0	1	(1000 MT)
TOTAL Imports	4	4	2	1	0	1	(1000 MT)
TOTAL SUPPLY	76	76	72	76	0	79	(1000 MT)
Intra EC Exports	0	2	0	2	0	3	(1000 MT)
Total Exports	0	0	0	0	0	0	(1000 MT)
TOTAL Exports	0	2	0	2	0	3	(1000 MT)
Domestic Consumption	76	74	72	74	0	76	(1000 MT)
TOTAL Use	76	76	72	76	0	79	(1000 MT)
Ending Stocks	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	76	76	72	76	0	79	(1000 MT)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

Imports: Dairy, Butter

Import Trade Matrix Country Brazil Commodity Dairy, Butter			
Time Period	Jan-Dec	Units:	Metric Tons
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Argentina	4,701		206
New Zealand	1,254		275
Uruguay	5,251		2,917
Total for Others	11206		3398
Others not Listed	72		112
Grand Total	11278		3510

Exports: Dairy, Butter

Export Trade Matrix Country Brazil Commodity Dairy, Butter			
Time Period	Jan-Dec	Units:	Metric Tons
Exports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Canada	140		862
Egypt	200		318
Peru	0		386
Total for Others	340		1566
Others not Listed	30		90
Grand Total	370		1656

PSD, Dairy, Dry Whole Milk Powder

Country Brazil Commodity Dairy, Dry Whole Milk Powder (1000 MT)							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Beginning Stocks	31	0	31	0		0	(1000 MT)
Production	390	390	400	420	0	440	(1000 MT)
Intra EC Imports	0	0	0	0	0	0	(1000 MT)
Total Imports	47	33	47	23	0	20	(1000 MT)
TOTAL Imports	47	33	47	23	0	20	(1000 MT)
TOTAL SUPPLY	468	423	478	443	0	460	(1000 MT)
Intra EC Exports	0	0	0	0	0	0	(1000 MT)
Total Exports	27	3	30	15	0	23	(1000 MT)
TOTAL Exports	27	3	30	15	0	23	(1000 MT)
Human Dom. Consumption	410	420	417	428	0	437	(1000 MT)
Other Use, Losses	0	0	0	0	0	0	(1000 MT)
Total Dom. Consumption	410	420	417	428	0	437	(1000 MT)
TOTAL Use	437	423	447	443	0	460	(1000 MT)
Ending Stocks	31	0	31	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	468	423	478	443	0	460	(1000 MT)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

Imports: Dairy, Dry Whole Milk Powder

Import Trade Matrix Country Brazil Commodity Dairy, Dry Whole Milk Powder			
Time Period	Jan-Dec	Units:	Metric Tons
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Argentina	61,125		19,228
Chile	4,490		1,000
European Union	598		105
New Zealand	4,896		919
Uruguay	25,023		11,365
Total for Others	96132		32,617
Others not Listed	74		50
Grand Total	96206		32667

Exports: Dairy, Dry Whole Milk Powder

Export Trade Matrix Country Brazil Commodity Dairy, Dry Whole Milk Powder			
Time Period	Jan-Dec	Units:	Metric Tons
Exports for:	2002		2003
U.S.	131	U.S.	145
Others		Others	
Algeria	0		940
Angola	44		151
Chile	0		625
Iraq	0		100
New Zeland	0		266
Oman	1,000		0
Russia	169		120
U.A.E.	0		250
Total for Others	1213		2452
Others not Listed	32		372
Grand Total	1376		2969

PSD: Dairy, Milk, Nonfat Dry

PSD Table Country Brazil Commodity Dairy, Milk, Nonfat Dry (1000 MT)							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Beginning Stocks	0	0	0	0	0	0	(1000 MT)
Production	108	108	100	110	0	113	(1000 MT)
Intra EC Imports	0	0	0	0	0	0	(1000 MT)
Total Imports	12	7	16	5	0	5	(1000 MT)
TOTAL Imports	12	7	16	5	0	5	(1000 MT)
TOTAL SUPPLY	120	115	116	115	0	118	(1000 MT)
Intra EC Exports	0	0	0	0	0	0	(1000 MT)
Total Exports	1	3	2	1	0	2	(1000 MT)
TOTAL Exports	1	3	2	1	0	2	(1000 MT)
Human Dom. Consumption	119	112	114	114	0	116	(1000 MT)
Other Use, Losses	0	0	0	0	0	0	(1000 MT)
Total Dom. Consumption	119	112	114	114	0	116	(1000 MT)
TOTAL Use	120	115	116	115	0	118	(1000 MT)
Ending Stocks	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	120	115	116	115	0	118	(1000 MT)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

Imports: Dairy, Milk, Nonfat Dry

Import Trade Matrix Country Brazil Commodity Dairy, Milk, Nonfat Dry			
Time Period	Jan-Dec	Units:	Metric Tons
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Argentina	6,037		2,564
New Zealand	1,131		66
Uruguay	10,434		4,080
Total for Others	17602		6,710
Others not Listed	0		25
Grand Total	17602		6735

Exports: Dairy, Milk, Nonfat Dry

Export Trade Matrix Country Brazil Commodity Dairy, Milk, Nonfat Dry			
Time Period	Jan-Dec	Units:	Metric Tons
Exports for:	2002		2003
U.S.	1	U.S.	0
Others		Others	
Angola	58		451
Algeria	2,500		0
Iraq	0		2,325
Total for Others	2558		2776